



How to use the SMART Web website

Last Updated - 08/22/2013

Learning Objectives

In this presentation our aim is to show you how to best use the **SMART Web** website:

- * Navigation
- * Content Organization
- * SMART Training Materials Overview
- * Performance Support Materials



SMART Web - Info Website



URL: <https://smartweb.ks.gov>

- * The **SMART Web** website is the State of Kansas informational website for SMART
- * It is your one stop shop for all things SMART!

SMART Web - Home Page

[Home](#) [Announcements](#) [Policy & Forms](#) [Training](#) [Technical Resources](#) [Kansas Service Desk](#) [About SMART](#)

Welcome

Welcome to the **SMART Web** for all things SMART. Here you can find more. Our goal is for this site to be successful. Please check back often as we continue to add new content to meet the needs of the SMART community.

[Login to Service Desk](#)
[Calendar](#)
[Month End Checklists](#)
[Reporting](#)
[Data Warehouse](#)

WHAT'S HAPPENING NOW...

SMART Current Status:
Available
(status entered at 8/9/2013 7:59:31 AM)


Old SMART Web

- The **old SMART** move content

Important items that will be stored here are:

- Existing SMART training materials

TELL US WHAT YOU THINK
(click the lightbulb)



Provides you with up to the moment availability of SMART

Calendar of upcoming events that impact SMART and SMART users

Click the light bulb to submit SMART Web website feedback as desired

☒ **Stay Informed!**

(required) Email address:

(required) Your name:

(required) Type in characters you see in the image below:

[Subscribe](#)

Upcoming Events

- No SMART Access 9/1**
September 01, 2013 12:00 AM - September 01, 2013 11:00 PM
- Labor Day 2013**
September 02, 2013 12:00 AM - September 02, 2013 11:59 PM

SMART Web - Stay Informed!


[Home](#) [Announcements](#) [Policy & Forms](#) [Training](#) [Technical Resources](#) [Kansas Service Desk](#) [About SMART](#)

Welcome

Welcome to the **SMART Web** website! We're very excited to bring you a dynamic and easy-to-use site for all things SMART. Here you will find all the information you need to be successful. Please check back often for the latest news and updates from the SMART community.

[Login to Service Desk](#)
[Calendar](#)
[Month End Checklist](#)
[Reporting](#)
[Data Warehouse](#)


TELL US WHAT YOU THINK
(click the lightbulb icon)



Make sure to sign up for the SMART Info List email group!


This email list is *HOW* the State of Kansas communicates with end users of SMART.


Email Announcements, SMART availability updates, and SMART Training Material/Performance Support updates are some examples of the communications sent out via this email list.

 **Stay Informed!**

(required) Email address:

(required) Your name:

(required) Type the characters you see in the image below:

Generate New Image
Get Audio Code

 **Upcoming Events**

- **No SMART Access 9/1**
September 01, 2013 12:00 AM - September 01, 2013 11:00 PM
- **Labor Day 2013**
September 02, 2013 12:00 AM - September 02, 2013 11:59 PM

SMART Web - Announcements

The screenshot shows the SMART Web Announcements page. At the top, there is a navigation bar with 'Home' and 'Announcements' links. Below this is a breadcrumb trail: 'Home > Announcements > Announcements'. The main heading is 'Announcements'. To the left, there is a sidebar with 'Announcements' and 'Module of the Month' links. A yellow callout box points to the 'Announcements' link in the sidebar, stating: 'Contains an archive of emails sent out from the SMART Info List'. Below the heading, there is a note: 'NOTE: Announcements dated January 4, 2013 are older email "blasts" that are commonly referenced.' Underneath the note are two sections: 'TODAY'S ANNOUNCEMENTS' and 'ANNOUNCEMENTS BY TOPIC'. The 'ANNOUNCEMENTS BY TOPIC' section contains a grid of 17 buttons: General System News, Asset Management, Budget Journals, Data Warehouse, Deposits, GL Journals, Interfaces, Interfunds, Procurement Cards, Projects & Grants, Purchase Orders, Reporting, Requisitions, Training, Travel & Expense, Vendors, and Vouchers. A green callout box points to the 'General System News' button, stating: 'Stored by SMART Module'.

Home Announcements

Home > Announcements > Announcements

Announcements

Announcements
Module of the Month

NOTE: Announcements dated January 4, 2013 are older email "blasts" that are commonly referenced.

TODAY'S ANNOUNCEMENTS

ANNOUNCEMENTS BY TOPIC

General System News	Asset Management	Budget Journals	Data Warehouse
Deposits	GL Journals	Interfaces	Interfunds
Procurement Cards	Projects & Grants	Purchase Orders	Reporting
Requisitions	Training	Travel & Expense	Vendors
Vouchers			


SMART Web - MoM (Module of the Month)

[Home](#) [Announcements](#) [Policy & Forms](#) [Training](#) [Technical Resources](#) [Kansas Service Desk](#) [About SMART](#)

[Home](#) > [Announcements](#) > [Module of the Month](#)

Module of the Month

[Announcements](#)
[Module of the Month](#)



Email Us!
We want to hear from you -
Send us your questions or
suggestions concerning the
Module of the Month.

Click the mailbox above to send
us an email
at smartmom@da.ks.gov

How It Works

The Module of the Month is a section of information concerning the modules that are available in SMART.

Each month we will feature a module and provide an in-depth article about it to help make your SMART processing go more smoothly.

THIS MONTH'S MODULE IS...

General Ledger

General Ledger is the SMART module that keeps a record of all accounting entries system-wide. In addition to allowing users to create journal entries directly online, this module also automatically retrieves accounting data from all other SMART modules via batch processing from expenditures to revenue collection.

The General Ledger stores the data that provides important information such as fund balances, expenditure reports and Actuals ledger transaction detail.

Click the button below to get started:

General Ledger

Each month one of our SME's (Subject Matter Experts) writes an in-depth article about their module.

SMART Web - Policy & Forms

[Home](#) [Announcements](#) [Policy & Forms](#) [Training](#) [Technical Resources](#) [Kansas Service Desk](#)

[Home](#) > [Policy & Forms](#) > Policies & Procedures

Policies & Procedures

[Policies & Procedures](#)
[Circulars](#)
[Accounting Forms](#)
[Security Access Forms](#)


IMPORTANT LINKS

The following links contain policy and procedure information specific to SMART:

- [SMART Policy Manual](#)
- [Office of General Services](#)
- [Office of Business Process Improvement - Procurement](#)
- [Office of the Budget](#)
- [Office of Human Resources](#)
- [Office of Information Technology Services](#)
- [State of Kansas](#)

SMART SECURITY ACCESS FORMS

The following files are the SMART Security Access Forms. Submit the completed forms to change access and removing roles to an employee, providing employees no longer with your agency or organization.

-  [Security Liaison Training Guide](#)
PDF, 624.70 KB

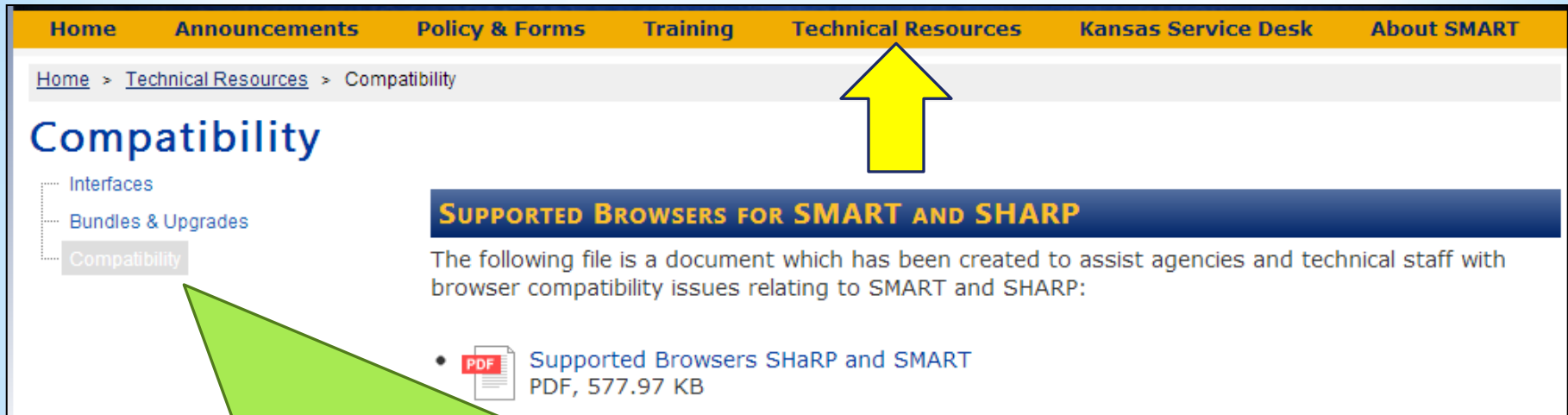
Frequently Used Accounting Forms

SMART Ready Forms

Accounting Forms ([Click here for Payroll forms](#))

Form #	Form Name	File Format
AM-001	InterUnit Transfer	pdf XLSX
DA-6 (rev 05-13)	Lost Check Statement - No changes needed to be made to the replacement check.	XLSX

SMART Web - Technical Resources



The screenshot shows the SMART Web interface. The top navigation bar includes links for Home, Announcements, Policy & Forms, Training, Technical Resources, Kansas Service Desk, and About SMART. A yellow arrow points to the 'Technical Resources' link. Below the navigation bar, a breadcrumb trail reads 'Home > Technical Resources > Compatibility'. The main heading is 'Compatibility'. On the left, a sidebar lists 'Interfaces', 'Bundles & Upgrades', and 'Compatibility' (which is highlighted). A green callout bubble points to the 'Compatibility' link in the sidebar. The main content area features a blue header 'SUPPORTED BROWSERS FOR SMART AND SHARP'. Below this, text states: 'The following file is a document which has been created to assist agencies and technical staff with browser compatibility issues relating to SMART and SHARP:'. A list item shows a PDF icon, the title 'Supported Browsers SHaRP and SMART', and the file size 'PDF, 577.97 KB'.


Home > Technical Resources > Compatibility

Compatibility

- Interfaces
- Bundles & Upgrades
- Compatibility

SUPPORTED BROWSERS FOR SMART AND SHARP

The following file is a document which has been created to assist agencies and technical staff with browser compatibility issues relating to SMART and SHARP:

-  Supported Browsers SHaRP and SMART
PDF, 577.97 KB

Interfaces - Give agencies the ability to 'upload' files into SMART

Bundles & Upgrades - Pertains to PeopleSoft software updates

Compatibility - Provides documentation regarding supported internet browsers that are compatible with SMART and SHaRP. Troubleshooting guide for agencies. Authored by OITS - The Office of Information and Technology Services

SMART Web - Kansas Service Desk

GENERATING REQUESTS

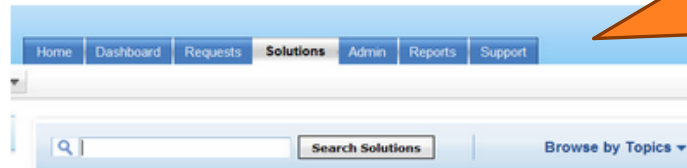
Got a question?
Need a problem resolved?
Want to request a new service or enhancement?
If you are a Registered Service Desk Contact for your agency then you have access!
Click on the Kansas Service Desk image below to get started:



Open a Service Desk Request (if applicable)

SOLUTIONS AVAILABLE!

Finding a solution is easy and anyone can do it! **Click on the Solutions image below**



Search the Solutions knowledge database for resolutions to common issues in SMART

FORGOTTEN PASSWORDS

Resetting a forgotten password is easy! Click on the "**Forgot Your Password**" link on the log in screen of [Employee Self Service](#), [SHaRP](#), or [SMART](#).

Kansas Service Desk Hours of Operation:

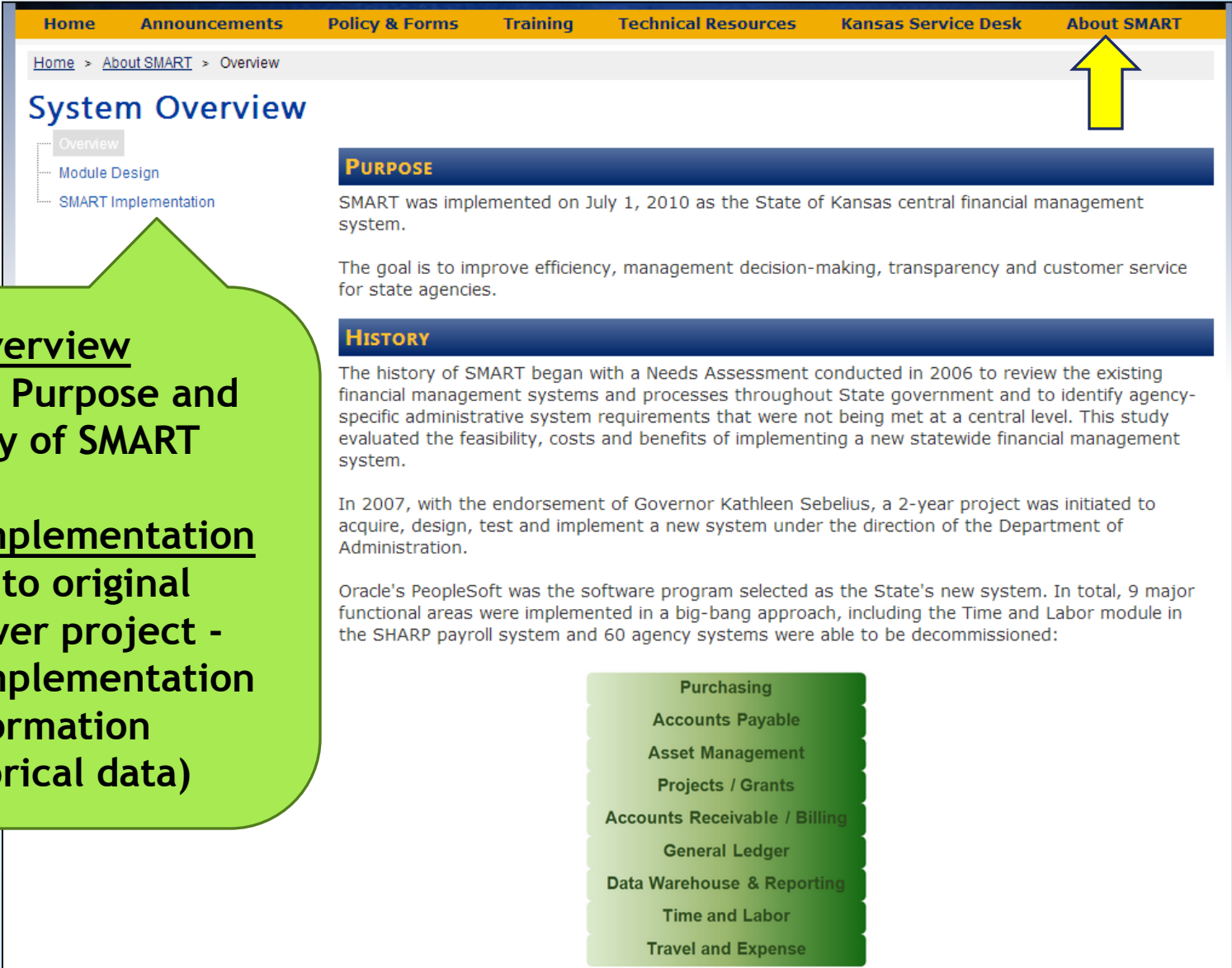
8:00 a.m. to 5:00 p.m.
Monday through Friday, except Holidays

Contact us at
785-368-8000 and Select Option 2 for SMART

Service Desk Hours

Reset your own password

SMART Web - About SMART



The screenshot shows the 'About SMART' page on the SMART Web. The navigation bar at the top includes links for Home, Announcements, Policy & Forms, Training, Technical Resources, Kansas Service Desk, and About SMART. A yellow arrow points to the 'About SMART' link. The breadcrumb trail shows Home > About SMART > Overview. The left sidebar contains links for Overview, Module Design, and SMART Implementation. The main content area is titled 'System Overview' and includes sections for Purpose and History. The Purpose section states that SMART was implemented on July 1, 2010, as the State of Kansas central financial management system, with the goal of improving efficiency, management decision-making, transparency, and customer service. The History section describes the project's start in 2006 with a Needs Assessment and its continuation in 2007 with the endorsement of Governor Kathleen Sebelius. It mentions that Oracle's PeopleSoft was selected as the new system, and 9 major functional areas were implemented in a big-bang approach, including the Time and Labor module in the SHARP payroll system and 60 agency systems being decommissioned. A vertical list of functional areas is shown on the right side of the page.

Overview
Includes Purpose and History of SMART

SMART Implementation
Links to original Sunflower project - SMART Implementation Information (Historical data)

PURPOSE

SMART was implemented on July 1, 2010 as the State of Kansas central financial management system.

The goal is to improve efficiency, management decision-making, transparency and customer service for state agencies.

HISTORY

The history of SMART began with a Needs Assessment conducted in 2006 to review the existing financial management systems and processes throughout State government and to identify agency-specific administrative system requirements that were not being met at a central level. This study evaluated the feasibility, costs and benefits of implementing a new statewide financial management system.

In 2007, with the endorsement of Governor Kathleen Sebelius, a 2-year project was initiated to acquire, design, test and implement a new system under the direction of the Department of Administration.

Oracle's PeopleSoft was the software program selected as the State's new system. In total, 9 major functional areas were implemented in a big-bang approach, including the Time and Labor module in the SHARP payroll system and 60 agency systems were able to be decommissioned:

- Purchasing
- Accounts Payable
- Asset Management
- Projects / Grants
- Accounts Receivable / Billing
- General Ledger
- Data Warehouse & Reporting
- Time and Labor
- Travel and Expense

SMART Web - Training - New Users

The screenshot shows the SMART Web Training - New Users page. The top navigation bar is gold and contains links: Home, Announcements, Policy & Forms, Training, Technical Resources, Kansas Service Desk, and About SMART. A yellow arrow labeled "Roll Over" points to the Training link. Below the navigation bar, the breadcrumb trail reads: Home > Training > New Users. The main heading is "New Users". To the left is a sidebar menu with a "New Users" header and a list of links: SMART Training Materials, Integration Materials, Accounts Payable, Accounts Receivable, Asset Management, Commitment Control - Budget, General Ledger, Interfunds, Projects & Grants, Purchasing, Travel & Expenses, and FY2013 Archive. The main content area has a "Welcome to SMART!" message, a "Roll Over" arrow pointing to the Training link, and a list of navigation buttons: Overview of SMART, Training Materials, What training do I need to take?, New Users - Web Based Training, More About SMART Training, and SMART Job Aids for New Users. A yellow speech bubble points to the "New Users" link in the sidebar menu.

Home > Training > New Users

New Users

Roll Over

Rolling over the top gold navigation bar options, prompts drop down menus to display

New Users start their SMART training on this page

The left menu shows how the Training information is organized and stored

Overview of SMART
Training Materials
What training do I need to take?

New Users - Web Based Training
More About SMART Training

SMART Job Aids for New Users

- New Users
- SMART Training Materials
- Integration Materials
- Accounts Payable
- Accounts Receivable
- Asset Management
- Commitment Control - Budget
- General Ledger
- Interfunds
- Projects & Grants
- Purchasing
- Travel & Expenses
- FY2013 Archive

SMART Web - Training Materials

[Home](#) > [Training](#) > SMART Training Materials

SMART Training Materials

Provides an overview to the training materials used on the website

TRAINING MATERIALS OVERVIEW

This section is designed to give you an **overview of the SMART Training Materials**. Listed below are links to documents regarding the SMART Training Materials; the icons used, the types of documents used, formats of documents, and so on.

In order to meet accessibility requirements, some SMART Training Material content is being developed in multiple formats, namely .PDF files and online web pages.

The **.PDF file format** allows you to open and view the document in a page format, which also allows for printing of the document if necessary. Please note that it is the State of Kansas best practice **NOT TO PRINT** training documents because these documents are updated on a frequent basis.

The **online (web page) format is accessed by clicking a blue navigation button** (where available) to open the web page(s) containing the content of the document. Web pages launch from the current page; they do not open in a new window. Once you have finished viewing the content on a web page, use the back button in your browser to return to the previous page. *Please note that the online web page format is recommended for users employing assistive technology devices and/or software.*



SMART Training Materials - Icon Guide - V.1.8

Icon Guide



SMART Training Materials - Guide For Use - V.1.1

Guide For Use

Click a document link to open the .PDF file in a new window,
OR

Click a navigation button to open the Web Page(s) with the same content

SMART Web - Materials - Icon Guide

On the 'New Users' Page - Click the 'Overview of SMART Training Materials' button:



SMART Web - Materials - Guide for Use

On the New Users Page:

Overview of SMART
Training Materials

Home Announcements Policy & Forms

Home > Training > SMART Training Materials


SMART Training Materials

TRAINING MATERIALS OVERVIEW

PDF SMART Training Materials - Guide For Use - V.1.1

Guide For Use

.PDF File, OR Web Page(s)



SMART Training Materials – Guide For Use

V.1.1. 7/26/2012

This document contains a guide to the SMART Training Materials and how to use them

SMART Training Materials - Icon Guide: The **Icon Guide** document contains a comprehensive list of the icons used within all SMART Training Materials. The Icon Guide provides the user with a graphic example of each icon and a description for each icon.

Checklists

- Checklists are numbered and have a title
For example: *Checklist 1 – Cannot Pull PO into Voucher*
- Each Checklist document contains a 'Checkmark' graphic in the top left corner (as shown to the left of this text)
- Each Checklist is intended to help the end user address and trouble shoot a specific question or issue within SMART
- Each Checklist contains a comprehensive list of SMART Training Materials that relate to the Checklist question or the module area. For example: Examples, Job Aids, and Solution

Provides a guide to the types of training materials on the SMART Web website and provides an explanation for each type

SMART Web - Materials - Checklists



Checklists

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- Each Checklist contains a comprehensive list of SMART Training Materials that relate to the Checklist question or the module area. For example: Foundation Information, Tools, UPK's, Scenarios, Examples, Job Aids, and Solution Articles

**Explanation of
'Checklists'**
*Excerpt from 'Guide
For Use', .PDF File,
Page 1*



Checklist 1 - Cannot pull PO into Voucher

V.1.8.

7/25/2012

This document contains a list of information, tools, and scenarios to help resolve this issue



Foundation Information

- It is important to understand that a Purchase Order (PO) must be:

Approved → 'Valid' Budget Status → 'Dispatched' PO Status

**Example of a
Checklist**
*Excerpt from
'Checklist 1 -
Cannot pull PO
into Voucher' .PDF
File*

SMART Web - Materials - Foundation Information

FOUNDATION INFORMATION



- Foundation information provides important 'building block' information and functionality requirements which impact each SMART module and its use.
- Each Foundation Information section contains a 'brick wall' graphic (see text)

Explanation of
'Foundation
Information' -
*Excerpt from 'Guide
For Use', Page 1, web
page*



Foundation Information

- It is important to understand that a Purchase Order (PO) must be:

Approved → 'Valid' Budget Status → 'Dispatched' PO Status

BEFORE it can be pulled in to a voucher.

- At the Header Level of the PO: If the '**Hold from further processing**' checkbox is selected, the PO can NOT be pulled in to the voucher.
- If 'Receiving is Required' for the PO line, then a **receipt** must also be created BEFORE the PO can be pulled in to the voucher.
- Use the **Purchase Order Inquiry** page (⚙️ **PO Tool 2**) to view the statuses of a purchase order in SMART.

Example of Foundation Information

*Excerpt from 'Checklist 1 -
Cannot pull PO into
Voucher', .PDF file*


SMART Web - Materials - Tools

Explanation of
'Tools'
Excerpt from 'Guide
For Use' web page,
Page 1

TOOLS



- Tools are designed to provide information regarding key page components that can be used to research and view additional information or a module
- Tools are named by SMART Module, Tool number, and Title. For example: PO Tool 1 – Activity Summary Page
- Each Tool document contains a 'Tool Sign' graphic in the top left corner (as shown to the left of this text)



PO Tool 1 - Activity Summary Page

V.1.4.	07/12/12
--------	----------

Use the **Activity Summary** page to review summary information pertaining to purchase orders, receipts, vouchers, payments, matching information, and RTV (Return to Vendor) information.
Anyone with the '**Agency Purchasing Viewer**' role can access this page and view the information on it.

Navigate to the Activity Summary page:
Purchasing > Purchase Orders >
Review PO Information > Activity
Summary

Enter the search criteria
and click the Search button

Select the desired search
result to open the **Activity
Summary** page

DETAILS TAB

Use the first tab – the **Details tab** to view the 'Order Qty', 'Amount Ordered', and the 'Amount Only' checkbox

Activity Summary

Example of a
Tool
Excerpt from
'PO Tool 1 -
Activity
Summary Page',
.PDF file

SMART Web - Materials - Scenarios

SCENARIOS

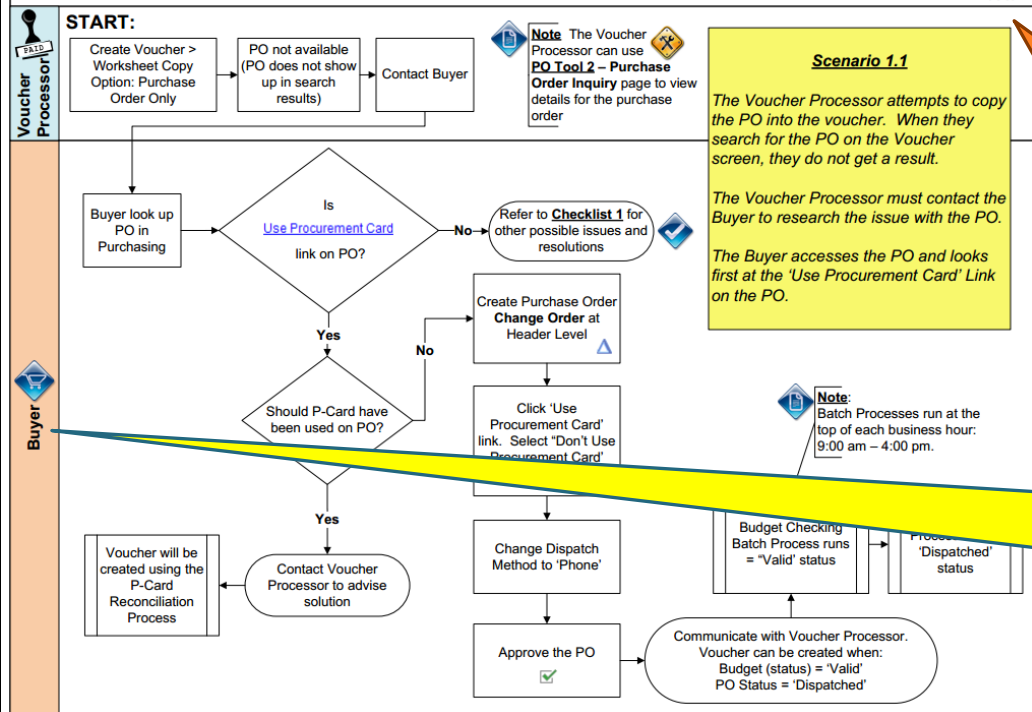


- Scenarios are designed to provide solutions to the 'Checklist' issue.
- Scenarios are associated to Checklists. Each Scenario contains a solution to the issue. Each scenario is named according to the issue it addresses. For example: Scenario 1.1: Cannot pull PO into Voucher / PO - 'Use Procurement Card' Link Visible?
- Scenarios should be used in order according to their Scenario Checklist issue. For example: Scenario 1.1, then 1.2, then 1.3, and so on.
- Each Scenario document contains:
 - A 'Puzzle Piece' graphic in the top left corner (as shown to the left of this document)
 - A title and resolutions, and a scenario explanation (in the 'Scenario 1.1' box)

Explanation of
'Scenarios'
Excerpt from 'Guide
For Use' web page,
page 1

Scenario 1.1: Voucher – Cannot pull PO into Voucher / PO – 'Use Procurement Card' Link Visible? Pg 1 of 1

V.1.4. – 7/05/12

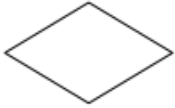


Example of a Scenario
“Scenario 1.1: Voucher - Cannot pull PO into Voucher / PO - 'Use Procurement Card' link Visible?”, .PDF file

This Business Process Flow diagram contains SMART Security Access Role assignments/modules

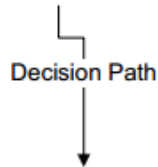
SMART Web - Materials - Business Process Flows

DECISION POINT



A diamond shape represents a decision point. This is a decision that needs to be made by the end user in SMART. Decision points are connected to their next steps by a 'connector', indicating which path the end user should take.

DECISION PATH



A 'connector' (arrow) indicates the direction in which the information is flowing. Any time a decision point (diamond shape) is encountered, the end user will be given a decision, and resulting decision paths based on the decision outcomes. The end user follows the desired path indicated by the connectors until a 'terminator' (oval or ellipse) shape is reached.

END OR TERMINATOR



The oval or ellipse shape (known as a 'terminator') indicates the end of this decision path or business process flow. Additional notes or information may be provided in conjunction with the terminator shape.

Explanation of 'Business Process Flow Shapes'

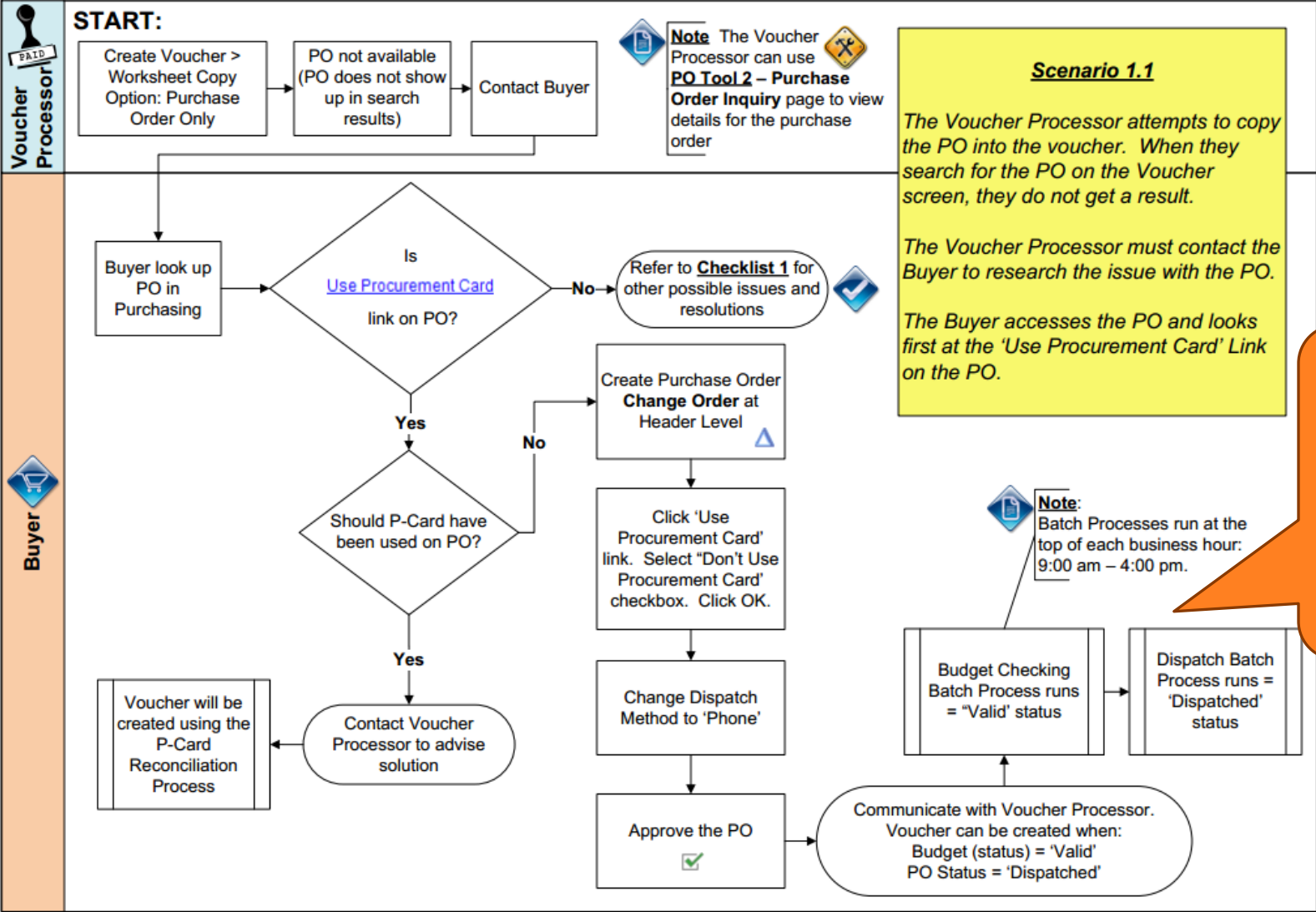
Excerpt from 'Guide For Use' web page, Page 2

Each business process flow shape definition is provided, to help the end user interpret the (sometimes complex) business process flow diagrams

SMART Web - Business Process Flow - Example

 Scenario 1.1: Voucher – Cannot pull PO into Voucher / PO – ‘Use Procurement Card’ Link Visible? Pg 1 of 1

V.1.4. – 7/05/12



SMART Web -Integration Training Materials

[Home](#) > [Training](#) > Integration Materials



Integration Training Materials

Integration covers the integration points between the different modules within SMART

What is 'Integration'?

Integration in SMART is *where and how* the SMART modules directly interact with one another and impact one another. There are many integration points between the fourteen modules within SMART. Integration means that different modules in SMART either *share or use* the same data within SMART.

Integration example

This example shows you how information is shared and used between different modules in SMART:

An *Agency Voucher Processor* selects a **Purchase Order** (from the Purchasing module) to pay a **Voucher** (in the Accounts Payable module). The Agency Voucher Processor selects the Purchase Order (PO) so that the information from the Purchase Order is populated in to the Voucher, this integrates the two modules and transactions together in SMART, and creates efficiency (less data entry as information is automatically populated from the PO to the Voucher).

Integration Training Materials

The SMART Training Materials provided within this Integration Training Materials section address potential issues or within SMART; and provides you with the tools, information, and scenarios to assist you in resolving those issues.

Example of Integration Information

PURCHASING (PO) AND ACCOUNTS PAYABLE (AP)

PO and AP

This section addresses the integration between the Purchasing modules (PO) and the Accounts Payable modules (AP).



SMART Web - Example: PO & AP Integration

Integration - PO (Purchasing) and AP (Accounts Payable)



CHECKLISTS

 Checklist 1 - Cannot pull PO into Voucher

Checklist 1


Checklists - Contain common issue(s)



TOOLS

 AP Tool 1 - Create Voucher - Worksheet Copy Option


AP Tool 1

 GEN Tool 1 - Req to Check Process in SMART


GEN Tool 1

 PO Tool 1 - PO Activity Summary Page


PO Tool 1

 PO Tool 2 - Purchase Order Inquiry Page

PO Tool 2

 PO Tool 3 - PO Accounting Entries

PO Tool 3


 PO Tool 4 - 'Amount Only' Information

PO Tool 4


Tools contain information which pertains to the SMART pages used, and steps of the issue(s) / resolution(s)



SCENARIOS

 Scenario 1.1 - Is 'Use Procurement Card' Link Available

Scenario 1.1

 Scenario 1.2 - Vendor ID

Scenario 1.2

 Scenario 1.3 - Is PO a 'Quantit' PO

Scenario 1.3

Scenarios provide the step-by-step instructions (in order) for the resolution of the issue(s). Start with the first Scenario and work your way through them (in numerical order)

SMART Web - Case Study: Checklist 1

[Home](#) > [Training](#) > [Integration Materials](#) > [PO and AP](#) > Checklist 1



Checklist 1 - Cannot pull PO into Voucher

This page contains a list of foundation information, tools, and scenarios to assist you in resolving this issue.



FOUNDATION INFORMATION



TOOLS



SCENARIOS AND SOLUTIONS



Scenario 1.1 - Is 'Use Procurement Card' Link Available



Scenario 1.2 - Vendor ID



Scenario 1.3 - Is PO a 'Quantity' PO

Scenario 1.1

Scenario 1.2

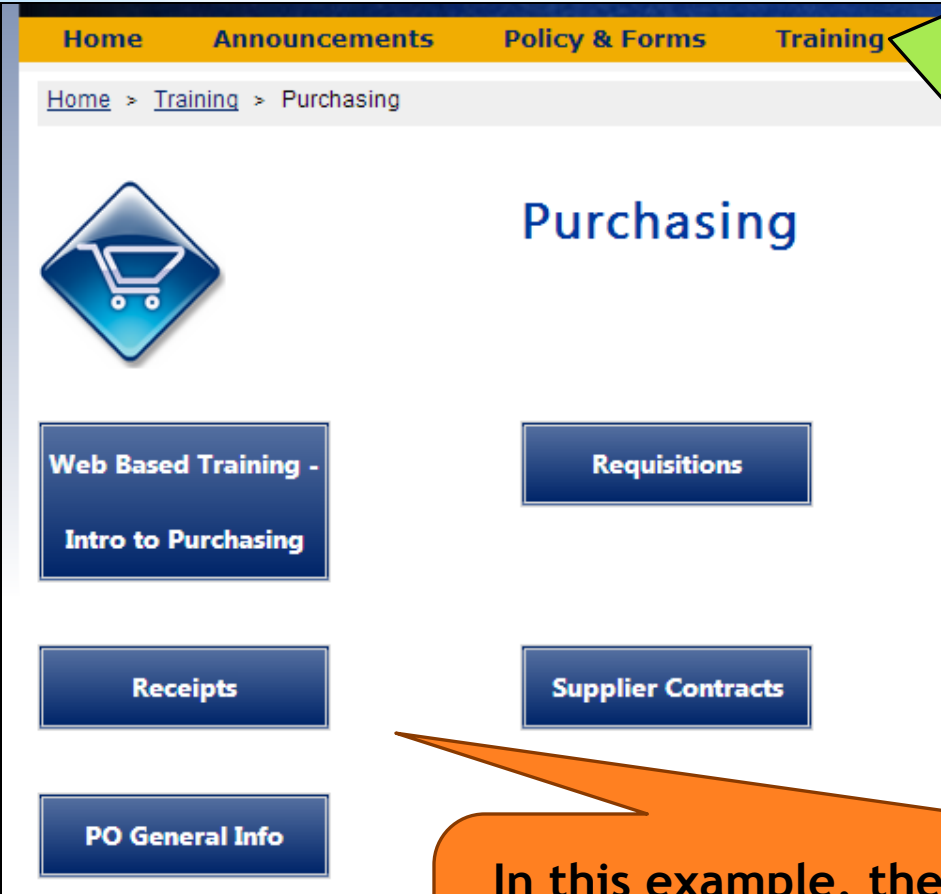
Scenario 1.3

Scenario 1.4

In this Case Study,
Checklist 1 is used

In this Case Study, review the Foundation Information first, then review the Tools; lastly review the Scenarios (in order), and follow the steps in each Scenario until the issue is resolved

SMART Web - Training Materials - Organization



The screenshot shows the SMART Web interface. At the top, there is a navigation bar with links: Home, Announcements, Policy & Forms, and Training. Below this, a breadcrumb trail reads: Home > Training > Purchasing. The main heading is 'Purchasing', accompanied by a shopping cart icon. The page is organized into a grid of buttons representing different purchasing modules: 'Web Based Training - Intro to Purchasing', 'Requisitions', 'Purchase Orders', 'Return To Vendor', 'Receipts', 'Supplier Contracts', 'Procurement Cards', 'PO Tools', and 'PO General Info'. A green callout box points to the 'Training' link in the navigation bar, and an orange callout box points to the 'Purchasing' heading.

Home Announcements Policy & Forms Training

Home > Training > Purchasing

Purchasing

Web Based Training -
Intro to Purchasing

Requisitions

Purchase Orders

Return To Vendor

Receipts

Supplier Contracts

Procurement Cards

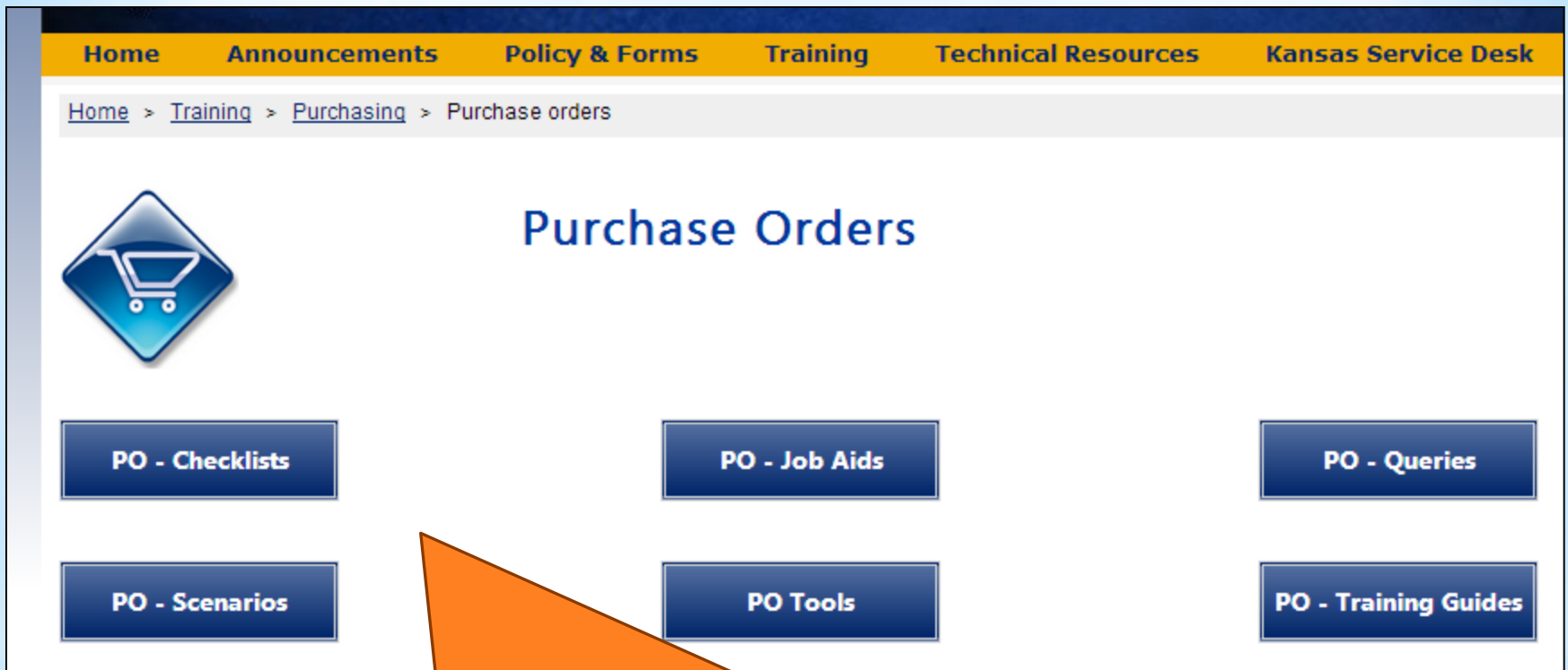
PO Tools

PO General Info

In the Training Section of the SMART Web website, the training materials are stored first by Module, then by Transaction type, then by Training Material type

In this example, the 'Purchasing' modules - training materials page has been opened. It is divided into the different Purchasing transaction types in SMART, and also by the different training material types.

SMART Web - Training Materials - Transaction Pages



In this example, the 'Purchase Orders' training materials page has been opened. As you can see, it is divided into the different training material types such as Checklists, Job Aids, Queries, and so on.

SMART Web - Training Materials - Job Aids

Home Announcements Policy & Forms Training Technical Resources

Home > Training > Purchasing > Purchase orders > PO Job Aids

Purchase Orders - Job Aids

The 'i' icon represents Job Aids

- BYRDFLT Buyer ID
PDF, 571.63 KB
- Manual PO Close Process
PDF, 727.36 KB
- Modifying PO Email & Fax Destinations
PDF, 529.92 KB
- Parameters for Closing PO's
PDF, 179.06 KB
- Sourcing Workbench - Staging Statuses - Cheat Sheet
PDF, 44.15 KB
- Working Errors on the Sourcing Workbench
PDF, 1020.82 KB

Hint: Make a Job Aid page your first stop when troubleshooting an issue in SMART!

Job Aids provide detailed information and instructions for specific tasks or issue resolution steps within SMART.


In this example, the Purchase Orders - Job Aids page is displayed.

SMART Web - Training Materials - Queries






Home Announcements Policy & Forms Training Technical Resources

[Home](#) > [Training](#) > [Purchasing](#) > [Purchase orders](#) > PO - Queries

Purchase Orders - Queries



The 'report page' icon represents Queries

-  Using the KS_PO_CLOSED_POS Query
PDF, 581.64 KB
-  Using the KS_PO_MAY_CLOSE Query
PDF, 647.89 KB
-  Using the KS_PO_NEGATIVE_PO_LINES Query
PDF, 472.67 KB
-  Using the KS_PO_POWPCA Query
PDF, 426.72 KB
-  Using the KS_PO_SHIPTO Query
PDF, 693.51 KB

State of Kansas Using the KS_PO_NEGATIVE_PO_LINES Query <small>Statewide Management, Accounting and Reporting Tool</small>	
Date Created:	June 8, 2012
Version:	2.1
Last Updated Date:	May 2, 2013
Purpose of the Query:	Negative PO lines create unauthorized budget in the SMART system. From a system perspective, if a negative PO line is entered that creates unauthorized budget, a requisition can be created using the unauthorized budget, the requisition can be successfully source to a Purchase Order and the Purchase Order can be successfully budget checked; however, no cash exists because the created budget was not authorized. Consequently, agencies should not enter negative PO lines. A query has been created to identify those POs that have a negative PO line.

Queries provide detailed information and instructions to run a specific query within SMART.

In this example, the Purchase Orders - Queries page is displayed.

SMART Web - Training Materials - Training Guides

Home Announcements Policy & Forms Training Technical Resources Kansas

[Home](#) > [Training](#) > [Purchasing](#) > [Purchase orders](#) > PO - Training Guides



Purchase Orders - Training Guides

The 'compass' icon represents Training Guides

-  [Reviewing and Approving POs - Training Guide](#)
PDF, 3.14 MB

STATEWIDE MANAGEMENT, ACCOUNTING AND REPORTING TOOL

Training Guide – Purchasing
Purchase Orders: Reviewing & Approving

State of Kansas

Training Guides are used during on-the-job training by Agency trainers to train new users for specific transactions or modules within SMART.


In this example, the **Purchase Orders - Training Guides** page is displayed.

SMART Web - Training Materials Pages

Home Announcements Policy & Forms Training Technical Resources Kansas Service Desk

Home > Training > Purchasing > Purchase orders

Purchase Orders









PO - Checklists PO - Job Aids PO - Queries

PO - Scenarios PO Tools

Home > Training > Purchasing > Purchase orders > PO Tools

PO Tools



-  PO Tool 1 - PO Activity Summary Page
-  PO Tool 2 - Purchase Order Inquiry Page
-  PO Tool 3 - PO Accounting Entries
-  PO Tool 4 - 'Amount Only' Information
- PO Tool 5 is currently under construction. Check back soon!
-  PO Tool 6 - Purchase Order Page - Top Section

PO Tool 1 PO Tool 2 PO Tool 3 PO Tool 4

Each of the different types of training materials also have their own page. In this example, the PO Tools page has been opened, and is shown at right.

SMART Web -Search Box

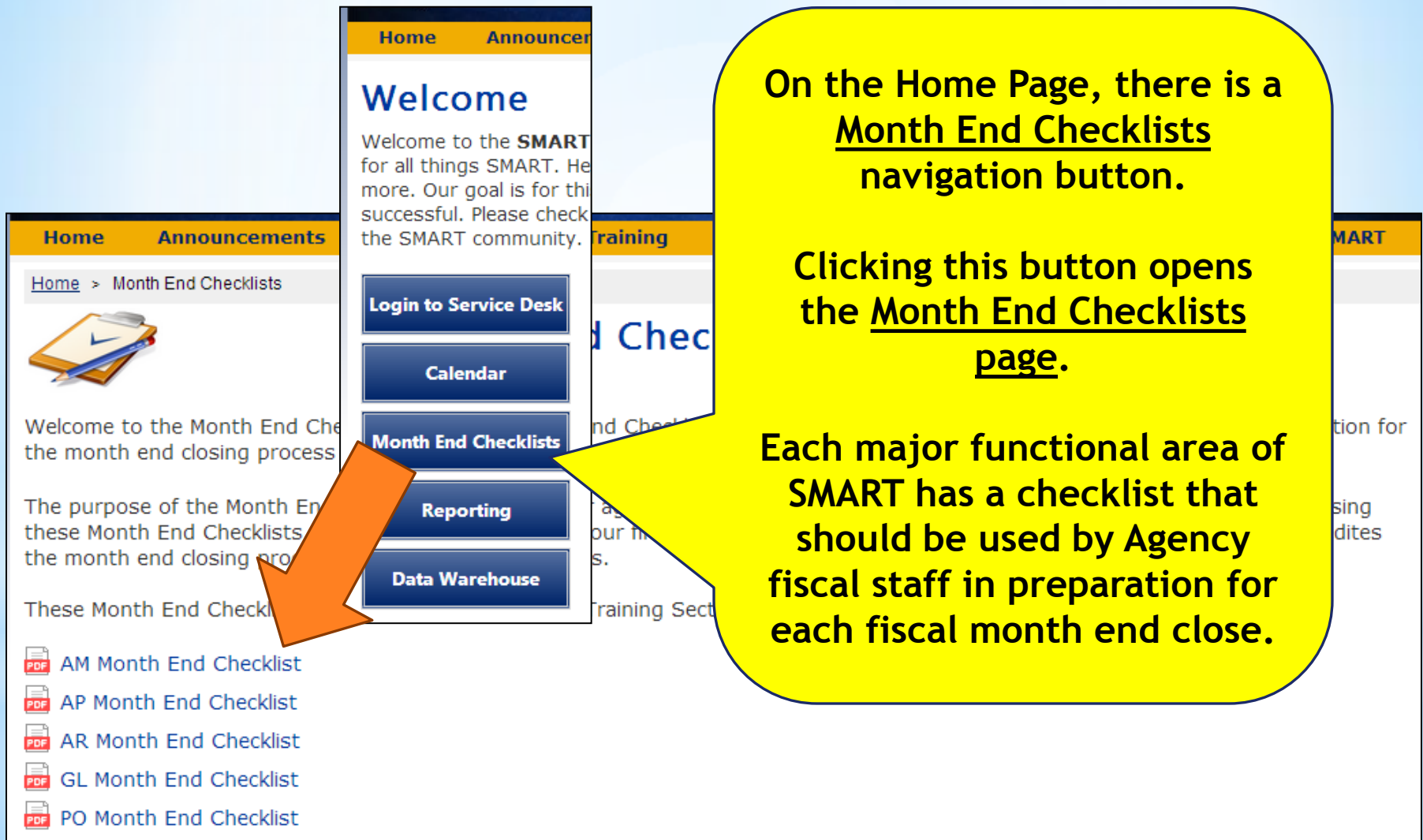


There is a Search Box located in the top right corner of the SMART Web website (available from every page on the website).

Use the Search Box to perform keyword searches for modules, transactions, issues, titles of training materials, articles, etc.

The content of the SMART Web website is 'Tagged' and 'Categorized' which allows for easy keyword or module specific searches

SMART Web - Month End Checklists



On the Home Page, there is a Month End Checklists navigation button.

Clicking this button opens the Month End Checklists page.

Each major functional area of SMART has a checklist that should be used by Agency fiscal staff in preparation for each fiscal month end close.

Home > Month End Checklists

Welcome to the SMART for all things SMART. He more. Our goal is for thi successful. Please check the SMART community.

Login to Service Desk

Calendar

Month End Checklists

Reporting

Data Warehouse

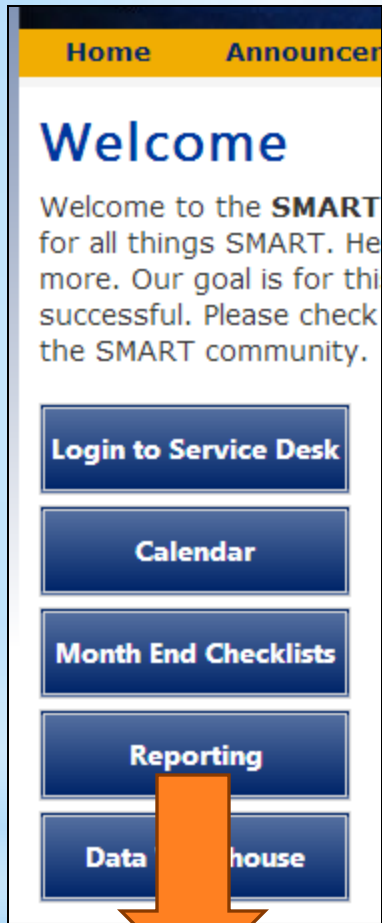
Welcome to the Month End Che the month end closing process

The purpose of the Month En these Month End Checklists the month end closing pro

These Month End Check

- PDF AM Month End Checklist
- PDF AP Month End Checklist
- PDF AR Month End Checklist
- PDF GL Month End Checklist
- PDF PO Month End Checklist

SMART Web - Reporting in SMART



There is a comprehensive SMART Catalog of Reports, Inquiries, and Queries available on the *SMART Web* website.

Simply click the 'Reporting' button located on the Home page to open the Reporting in SMART page. The Reporting in SMART page contains a link to the Catalog.

The link to the Catalog file is available as a '.xlsx' file. Click the .xlsx file link to download the complete catalog.

SMART - CATALOG OF REPORTS, INQUIRIES AND QUERIES

The link below will open the SMART Catalog of Reports, Inquiries and Queries that are currently available to users:



08-05-2013---Catalog of SMART Reports, Queries, and Inquiries

SMART Web - Catalog of Reports, Queries & Inquiries

In the **Catalog**: The **first tab** contains ALL reports, queries, and inquiries within SMART. If desired, use the column filters to sort the data:

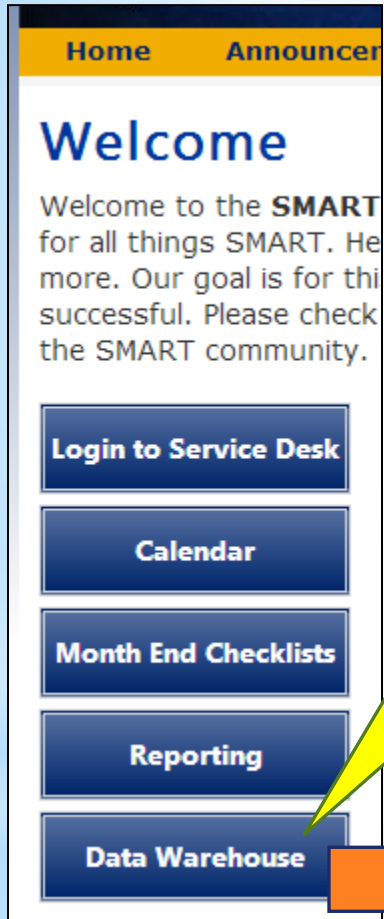
Report/Query/Inquiry Name	Module	SMART or DW	Description	Navigation in SMART / DW	SMART Role	Export Option(s)
KS_KK_CASH_BAL_DETAIL_FY13	KK	Query	Query of Cash against the CC_CASH and CC_CSH_BEN Ledgers by FY Accts Period	Reporting Tools -> Query -> Query Viewer	KGL_KS_GL_VIEWER	Excel, HTML

In the **Catalog**: The **subsequent tabs** are divided by module, and provide additional information for each report, query, or inquiry including '**Search Criteria**' (to enter to retrieve the data) and '**Display Results**' (that shows how the data results are displayed, which are contingent on the Search Criteria entered).

In this example, the **AP tab** of the Catalog is shown:

1	ACCOUNTS PAYABLE					
2	Last Updated: 07-29-2013					
3						
4	Accounts Payable - Additional Job Aids (on SMART WEB website)					
5	Using the KS_PO_VCHR_TO_PCARD_XREF query					
6						
7	If desired, click the link above to open the document in a new window.					
8						
9	In the table below, the highlighted fields contain links to Job Aids on the SMART WEB website.					
10	Job Aids provide additional information regarding the query or report. Click the link to open the job aid document in a new window.					
11						
12	Type:					
13	Inquiry - View results in SMART - online pages. You enter the search criteria and can then view the information online in SMART.					
14	Query - Uses the Reporting Tools function. Enter the desired Search criteria, and then run the query to view or export the results (using Excel).					
15	Report - Enter the Search criteria to retrieve the desired records. Multiple Export options.					
16						
17	Name of Inquiry, Query, or Report	Type	Description	Navigation path in SMART	SMART Roles who can access	Export Option(s)

SMART Web - Data Warehouse



The SMART Web website contains a Data Warehouse overview page.

Clicking the 'Data Warehouse' button on the Home Page of the SMART Web website, opens a page that contains training materials for the Data Warehouse, and instructions on how to access the Data Warehouse (from SMART).

The page also contains .PDF files describing some of the dashboards and reports that are available within the Data Warehouse.





Congratulations!

You have now learned how to best use the **SMART Web** website.

Since the **SMART Web** website is your 'one stop shop' for all things SMART, you will probably end up visiting it on a daily basis. Listed below is the URL address for your convenience:

URL: <https://smartweb.ks.gov>